Getting Started with TPS Web 2.0 R8

04 Jan 2019

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Introduction

The New TPS Web 2.0 Site

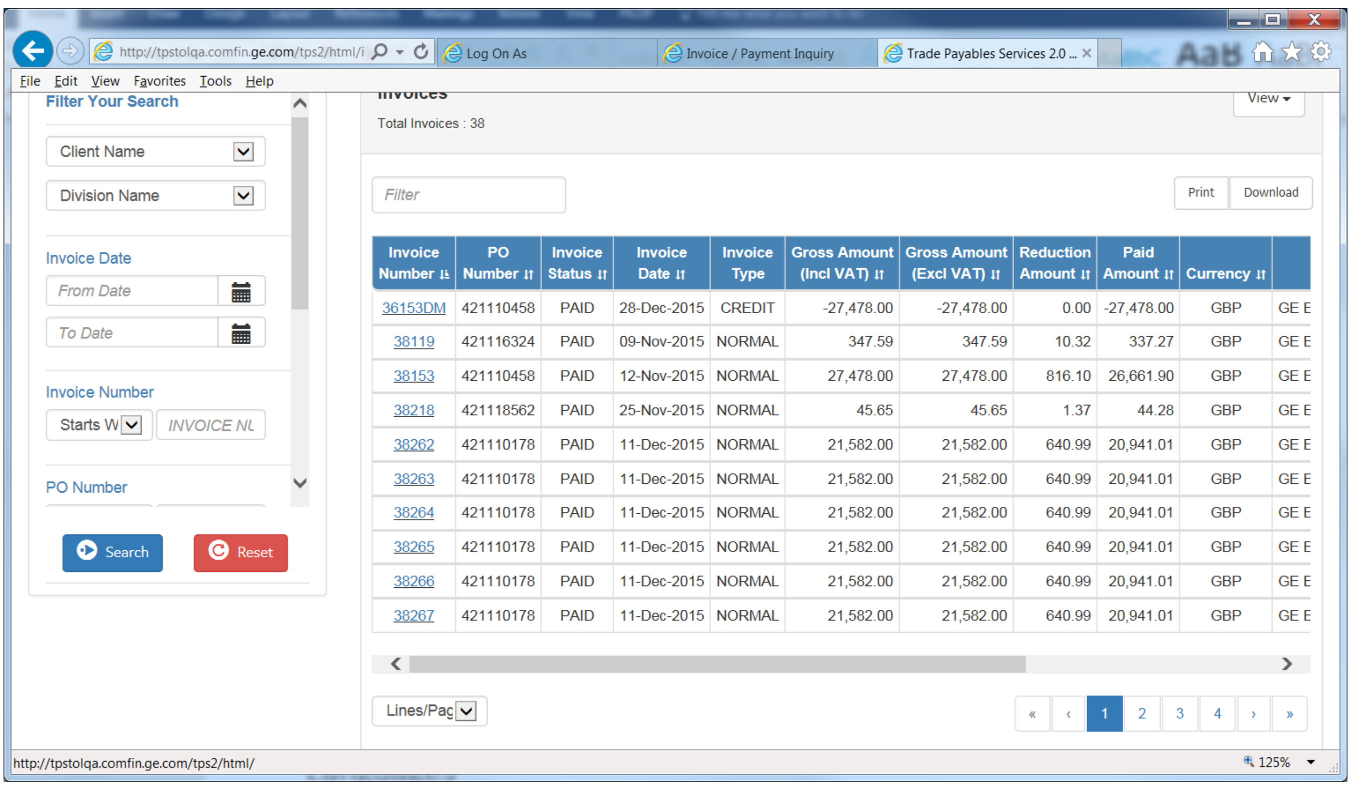
The TPS Web 2.0 site was formally released for the EU and the US in 2017 Q4.

For the EU site: You will be logged into the new TPS Web 2.0 site, but can link to the old site if you need additional languages besides English or Spanish.

For the US site You will be logged into the new TPS Web 2.0 site. The old site has been disabled as of Nov 2018.

Note: the screenshots displayed below are taken from the EU site, but the US site is very similar.

TPS Web 2.0 modernizes the look-and-feel and greatly improves the usability of the site. You will find that the process of searching for payments and invoices is easier, faster, and more functional.



Languages

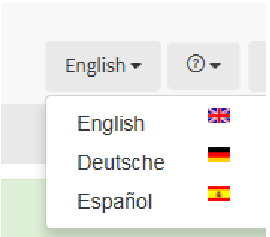
The TPS Web 2.0 EU site currently supports the following languages:

- English

- Spanish
- German

Other languages (Italian, French, Mandarin Chinese) are being added as soon as possible.

You can select the desired language from the language dropdown.



Browsers and Device Compatibility

TPS Web 2.0 has been tested in the following browsers:

- Internet Explorer Edge
- Internet Explorer 11
- Chrome (latest version)
- Firefox (latest version)

The site has been designed for use on mobile devices. It has been tested on the following devices:

- iPad Air 2
- iPhone 6

What's New?

The following modifications have been made in this release:

Europe Site

- Bug fixes
- TPS Reference Number added to Invoice search results and search criteria, along with:
    - Download
    - Print
    - Invoice Detail

US Site

- Bug fixes
- Voucher Number added to Invoice Search results print.

Coming Soon

The following enhancements are planned for future releases:

Europe Site

- Additional languages (Italian, French, Mandarin Chinese)
- Auto-Remittance advice option
- Registration simplification

US Site

- Registration simplification

Providing Feedback

We welcome feedback on the new site. Just click on the Feedback button in the top-right menu and let us know what you think.

Contacting Us

You can contact us with any question or request. Just click on the Contact Us button in the top-right menu and let us know how we can help.

Searching for Payments and Invoices

Last 10 Payments - The Default Search Results

When you first login to TPS Web 2.0, the default search is executed. This search returns the most recent ten payments in reverse date order. At any time, you can re-execute the default search by clicking the Reset button.

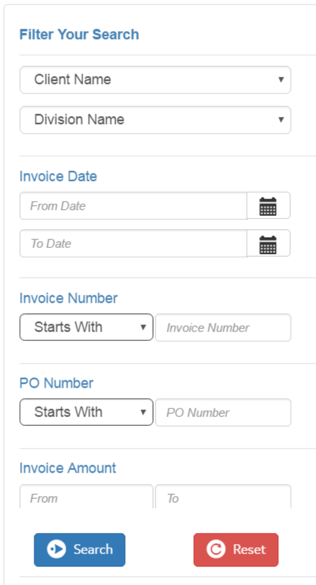
	Bank Account	Payment Date	Number of Invoices	Gross Amount (Incl VAT)	Gross Amount (Excl VAT)	Reduction Amount	Paid Amount	Currency
+	*1111	21-Jan-2016	2	58,622.00	58,622.00	1,672.34	56,949.66	GBP
+	*1111	20-Jan-2016	11	272,812.00	272,812.00	8,184.36	264,627.64	GBP
+	*1111	18-Jan-2016	3	87,262.00	87,262.00	2,469.51	84,792.49	GBP
+	*1111	14-Jan-2016	4	117,244.00	117,244.00	3,482.16	113,761.84	GBP
+	*1111	13-Jan-2016	2	1,997.17	1,997.17	59.92	1,937.25	GBP
+	*1111	06-Jan-2016	1	45.65	45.65	1.37	44.28	GBP
+	*1111	05-Jan-2016	4	4,868.00	4,868.00	837.73	4,030.27	GBP
+	*1111	24-Dec-2015	2	27,825.59	27,825.59	826.42	26,999.17	GBP
+	*1111	18-Dec-2015	2	54,956.00	54,956.00	1,610.22	53,345.78	GBP
+	*1111	17-Dec-2015	7	151,074.00	151,074.00	4,486.93	146,587.07	GBP

The Payment From date field in the Search Criteria bar will contain the first of the last 10 payment dates.

Using the Search Criteria Bar

General Usage

Simply enter the desired search criteria in the search criteria bar and click Search.



Helpful hints

- You may have to scroll to access all search criteria.
- When a filter criterion is specified, an "X" will appear to the right of the criterion. This allows you to quickly clear the search criterion.
- Clicking Reset will clear ALL search criteria as well as execute the default search.
- If the Submit button is disabled, this means that an invlaid entry has been entered. There should be a validation message beneath the associated field.

Dropdowns

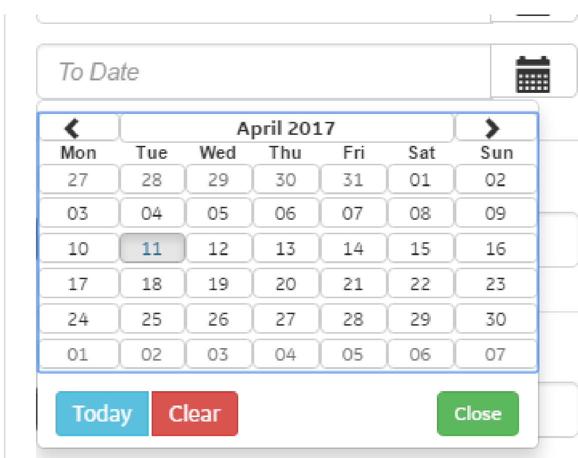
Selecting a client in Client Name dropdown will re-populate the Division dropdown with the selected client's divisions.

Date Fields

You can enter dates directly the date range fields (Invoice Date, Payment Date). The following is an example of the correct format to enter.

01-Jan-2016

You can also use the data calendar. When clicking the calendar icon, a dropdown calendar is invoked.

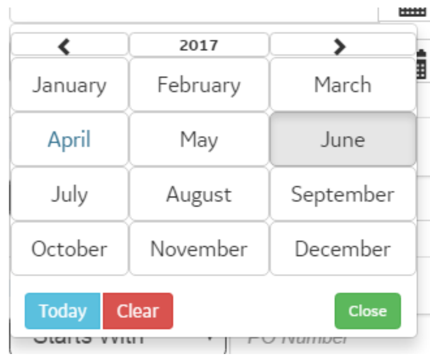


Using the calendar, you can:

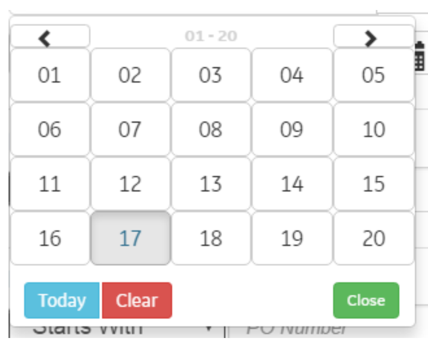
Click on a date to enter selected date into date field.

Click on the arrow signs to navigate to other months.

Click on the month title (ex. April 2017) to drill down to a year calendar, where you can select any month of the year or navigate to other years.



Drill down further by clicking the year title (ex. 2017) to access a year-range calendar, where you can select a year or navigate by ranges of years (ex. 01-20 – i.e 2001 – 2020)



Amount Ranges

Amount ranges (Invoice Amount, Payment Amount) require numeric entries. Currency symbols and commas will not work.
Note the following examples showing the right and wrong way to enter amount ranges.

From	To	Remarks
Right		
4000	4999	From 4000 to 4999
10.50	11	From 10.50 to 11
2000		Greater than or equal to 2000
	1999	Less than or equal to 1999

Wrong		
$4000	$5000	Currency symbol not allowed.
3,000	4,000	Comma not allowed.
4000	3000	From amount cannot be greater than To amount.

Reference Number Fields

Reference Number fields (Invoice Number, PO Number) allow you to search on complete or partial numbers. You can specify Starts With, Contains, or Ends With.

Paid and Forecast Radio Buttons

The Paid and Forecast radio buttons let you specify whether you want to retrieve paid or unpaid invoices in the search results.
As of this writing (Oct 2018), this feature was only available in US site.

Navigating the Search Results

Overview

TPS Web 2.0 provides many options for navigating the data returned by the search.

Viewing the Invoice Detail

You can click on Invoices in the search results to invoke the Invoice Detail popup. This includes much more information than is displayed in the invoice row in the search results.

When the invoice Detail popup is invoked, you can also print the invoice information.

Changing the View

Click the *View* button to change the view to one of the following:

- By Payment Drilldown
- By Payments and Invoices
- By Invoices Only

The *By Payment Drilldown* view (the default view) returns one row for each payment.

	Bank Account	Payment Date	Number of Invoices	Gross Amount (Incl VAT)	Gross Amount (Excl VAT)	Reduction Amount	Paid Amount	Currency
+	*1111	21-Jan-2016	2	58,622.00	58,622.00	1,672.34	56,949.66	GBP
+	*1111	20-Jan-2016	11	272,812.00	272,812.00	8,184.36	264,627.64	GBP
+	*1111	18-Jan-2016	3	87,262.00	87,262.00	2,469.51	84,792.49	GBP
+	*1111	14-Jan-2016	4	117,244.00	117,244.00	3,482.16	113,761.84	GBP

Each row includes a “+” sign which allows you to expand the row to display all associated invoices.

			Bank Account	Payment Date	Number of Invoices	Gross Amount (Incl VAT)	Gross Amount (Excl VAT)	Reduction Amount	Paid Amount	Currency
−			*1111	21-Jan-2016	2	58,622.00	58,622.00	1,672.34	56,949.66	GBP
	Invoice Number	**PO Number**	**Invoice Status**	**Invoice Date**	**Invoice Type**	**Gross Amount (Incl VAT)**	**Gross Amount (Excl VAT)**	**Reduction Amount**	**Paid Amount**	**Currency**
	38375	421110458	PAID	08-Jan-2016	NORMAL	28,640.00	28,640.00	781.87	27,858.13	GBP
	38377	421100435	PAID	08-Jan-2016	NORMAL	29,982.00	29,982.00	890.47	29,091.53	GBP
+			*1111	20-Jan-2016	11	272,812.00	272,812.00	8,184.36	264,627.64	GBP

The *By Payments and Invoices* view displays payments fully expanded to show all associated invoices.

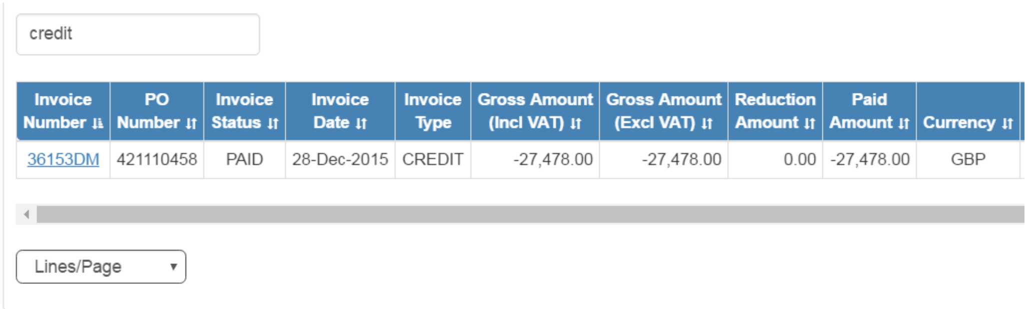
		Bank Account	Payment Date	Number of Invoices	Gross Amount (Incl VAT)	Gross Amount (Excl VAT)	Reduction Amount	Paid Amount	Currency
		*1111	21-Jan-2016	2	58,622.00	58,622.00	1,672.34	56,949.66	GBP
Invoice Number	**PO Number**	**Invoice Status**	**Invoice Date**	**Invoice Type**	**Gross Amount (Incl VAT)**	**Gross Amount (Excl VAT)**	**Reduction Amount**	**Paid Amount**	**Currency**
38375	421110458	PAID	08-Jan-2016	NORMAL	28,640.00	28,640.00	781.87	27,858.13	GBP
38377	421100435	PAID	08-Jan-2016	NORMAL	29,982.00	29,982.00	890.47	29,091.53	GBP
		*1111	20-Jan-2016	11	272,812.00	272,812.00	8,184.36	264,627.64	GBP
Invoice Number	**PO Number**	**Invoice Status**	**Invoice Date**	**Invoice Type**	**Gross Amount (Incl VAT)**	**Gross Amount (Excl VAT)**	**Reduction Amount**	**Paid Amount**	**Currency**
38382	421110458	PAID	08-Jan-2016	NORMAL	28,640.00	28,640.00	859.20	27,780.80	GBP
38383	421110458	PAID	08-Jan-2016	NORMAL	28,640.00	28,640.00	859.20	27,780.80	GBP
38384	421110458	PAID	14-Jan-2016	NORMAL	28,640.00	28,640.00	859.20	27,780.80	GBP
38387	421100435	PAID	14-Jan-2016	NORMAL	29,982.00	29,982.00	899.46	29,082.54	GBP
38388	421100435	PAID	14-Jan-2016	NORMAL	29,982.00	29,982.00	899.46	29,082.54	GBP

The *By Invoices Only* view displays only the invoices.

Invoice Number	PO Number	Invoice Status	Invoice Date	Invoice Type	Gross Amount (Incl VAT)	Gross Amount (Excl VAT)	Reduction Amount	Paid Amount	Currency
36153DM	421110458	PAID	28-Dec-2015	CREDIT	-27,478.00	-27,478.00	0.00	-27,478.00	GBP
38119	421116324	PAID	09-Nov-2015	NORMAL	347.59	347.59	10.32	337.27	GBP
38153	421110458	PAID	12-Nov-2015	NORMAL	27,478.00	27,478.00	816.10	26,661.90	GBP
38218	421118562	PAID	25-Nov-2015	NORMAL	45.65	45.65	1.37	44.28	GBP
38262	421110178	PAID	11-Dec-2015	NORMAL	21,582.00	21,582.00	640.99	20,941.01	GBP

Filtering the Search Results Table

Enter characters into the Filter textbox to immediately filter the search results table. As you type, rows will be filtered to only those containing your current filter text.



Invoice Number	PO Number	Invoice Status	Invoice Date	Invoice Type	Gross Amount (Incl VAT)	Gross Amount (Excl VAT)	Reduction Amount	Paid Amount	Currency
36153DM	421110458	PAID	28-Dec-2015	CREDIT	-27,478.00	-27,478.00	0.00	-27,478.00	GBP

Notes on filter:

- Date filters do not yet work as expected. The search accepts yyyy-mm-dd format, but dates are displayed is dd-mon-yyyy format. For example, a data displayed as “28-Dec-2015” will be retrieved by filter “2015-12-28”.
- The number filter works without the comma. So if there is a number 123456, it will be displayed as 123,456 in the table but will be retrieved by the filter “123456” (but not “123,456”).

Sorting Columns

You can sort the table on any column by simply clicking on the column header. Clicking on the column header toggles the sort order between ascending and descending order.

Horizontal scrolling

If the table columns do not fit into the visible screen, the horizontal scroll bar will appear, allowing you to scroll to the right or left.

Pagination

Pagination allows you to split data across multiple pages.

The Lines/Page dropdown allows you to specify how many rows to display per page.

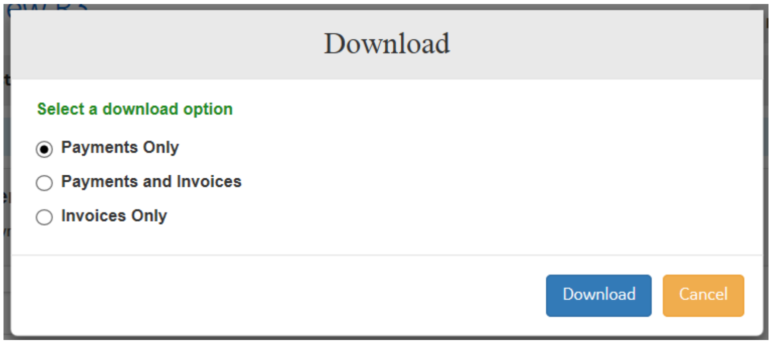
The pagination menu (under the table to the right) allows you to navigate the pages, jumping to the first or last page, or navigating page by page. The number of pages available for navigation are dependent upon the lines per page.

Downloading Search Results to CSV

You can download the search results data to the CSV format (which can easily be displayed in Microsoft Excel). After executing the desired search, click the *Download* button. You will be given the option to download to one of the following formats (which match the available search results views):

- Invoice Only
- Payment Only

- Payment and Invoices



Clicking Download should invoke your system's standard download functionality, allowing you to save and/or open the file.

Printing Search Results

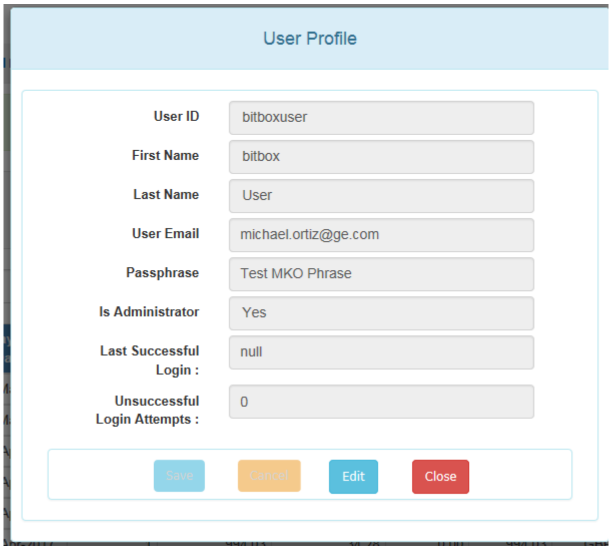
You can print the search results data. After executing the desired search, click the *Print* button. You will be given the option to print using one of the following formats (which match the available search results views):

- Invoice Only
- Payment Only
- Payment and Invoices

Clicking Print will invoke a popup which displays a printer-friendly popup which you can then print.

Viewing and Editing your User Profile

To view basic information regarding your profile, go to the user button (with your user ID on it) and click User Profile from the dropdown menu.



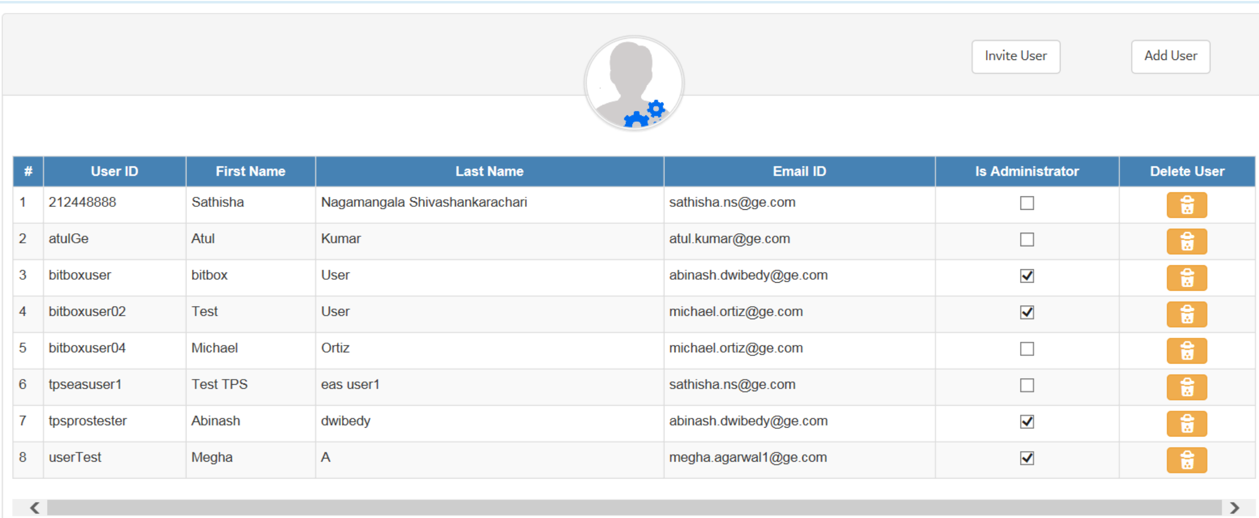
You can also edit selected fields after clicking the Edit button. As of this release, you can only edit your email address and passphrase.

Using the User Administration Module

The User Admin module allows administrators to view users, invite users, add users, delete users, and toggle users between end-user and admin. End-users can also perform some of these functions.

Viewing Existing Users

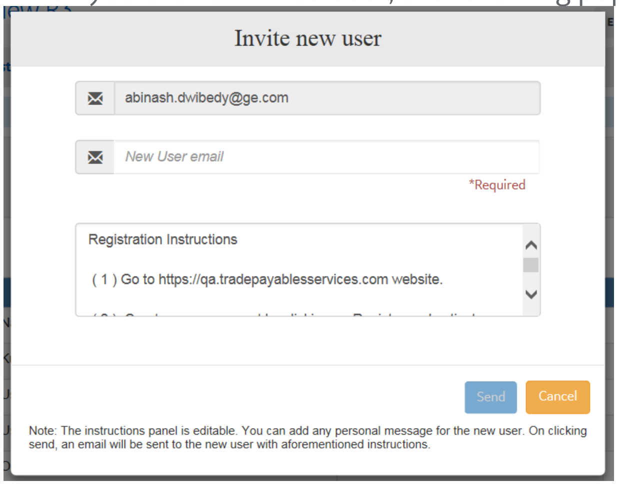
When you click on the User Administration tab, the User Admin module will appear, displaying all active users, along with their user ID, name, email, and admin status.



#	User ID	First Name	Last Name	Email ID	Is Administrator	Delete User
1	212448888	Sathisha	Nagamangala Shivashankarachari	sathisha.ns@ge.com	☐	
2	atulGe	Atul	Kumar	atul.kumar@ge.com	☐	
3	bitboxuser	bitbox	User	abinash.dwibedy@ge.com	☑	
4	bitboxuser02	Test	User	michael.ortiz@ge.com	☑	
5	bitboxuser04	Michael	Ortiz	michael.ortiz@ge.com	☐	
6	tpseasuser1	Test TPS	eas user1	sathisha.ns@ge.com	☐	
7	tpsprostester	Abinash	dwibedy	abinash.dwibedy@ge.com	☑	
8	userTest	Megha	A	megha.agarwal1@ge.com	☑	

Inviting a User

When you click on Invite User, the following popup appears:



Enter the email of the person you wish to invite to become a new user.

The Registration Instructions field is an editable field containing registration instructions. You can add any text you want to these instructions. Clicking Send will send the email to the user. The registration instructions will be included in the email.

These instructions tell the invitee how to register for TPS Web 2.0 (including setting up a user ID and password). They also instruct the user to send their selected user ID to the supplier admin.

Adding a User

Once a user has registered and sends you their user Id, you can add the user to the web site. Click the Add User button, enter the user's ID, and click Add. The user will be added to the user list.

When you add a user to the web site, the user will be an end-user (i.e non-admin).

Deleting a User

You can delete a user using the Delete User icon. This only removes the user form the site; the user remains registered. Therefore, you can simply re-add the user to the web site if you choose.

Setting a User as Admin or End-User

Click on the *Is Administrator* checkbox to toggle user between Admin and End-User. Only admins can access the User Admin module.

User Rights

The following describes what administrators and end-users can do in User Admin:

- End users can view, invite, and add users.
- Admins can do the same things end-users can do, and can also delete users and update users (i.e toggle users between end-user and admin).
- Admins CANNOT delete themselves or switch themselves to a non-admin. This guarantees that there will be at least one admin for each supplier.

About GE

GE (NYSE: GE) is the world's Digital Industrial Company, transforming industry with software-defined machines and solutions that are connected, responsive and predictive. GE is organized around a global exchange of knowledge, the "GE Store," through which each business shares and accesses the same technology, markets, structure and intellect. Each invention further fuels innovation and application across our industrial sectors. With people, services, technology and scale, GE delivers better outcomes for customers by speaking the language of industry.

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